

# Self-Paced Online Payment Portal (PayZang) Training Guide

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This guide is to provide information in navigating the State of Montana Online Payment Portal (NMI), which is provided by PayZang. Not all sections will apply to all Online Payment Pages (OPPs) depending on enabled features, such as credit/debit cards and/or ACH (electronic checks). To gain access to the NMI portal, please open a case with the SITSD Service Desk.

## Standalone Payment Configuration

There are several configuration options for standalone payment solutions. If you have a standalone OPP, you can watch this [seven-minute](#) video to view the options.

## Acknowledging Payment Agreement

Users will be required to acknowledge the agreement when making payments through the portal. For state employees who accept payments over the phone using the payment portal, you will also be required to acknowledge the agreement on behalf of the customer. However, there is no need to read the user agreement to customers over the phone as it is not a federal or state requirement.

## Voiding Transactions

To void a transaction, first login to the [NMI Portal](#). Transactions can be voided only if they have not been submitted to the payment processors which happens every day at 5pm MST. For more information, you can watch this [three-minute](#) video.

1. Navigate to **Transaction Reports** on the left-hand menu near the bottom,
2. Select the **Show Today's Transactions** button to the right of the "**Search Transactions**" title,
3. Select the ID link (the third column in blue) for the appropriate transaction,

### Test Transaction Detail

<b>Void</b>	<b>Refund</b>	Charge Again ▾	<b>Print Receipt</b>	<b>Email Receipt</b>
<b>Transaction Information</b>				
<b>Merchant:</b> State Test - (Salt Lake City, UT)		<b>Date:</b> 02/03/2021 2:07:10 PM MST		
<b>Transaction ID:</b> 5982057398		<b>Transaction Type:</b> Card Sale		
<b>Status:</b> Pending Settlement				

4. Select the **Void** Button,
5. The Void Transaction page is displayed with the Transaction ID,
6. Select **Void** again, the transaction is now Voided.

## Refunding Transactions

To refund a transaction, first log into the [NMI Portal](#). Transactions can be refunded at any time. Transaction and merchant fees apply. For more information, you can watch this [three-minute](#) video.

1. Select the **Credit Cards** or **Electronic Check** menu on the left at the top to drop down the list,
2. Select **Refund**,
3. Enter the Transaction ID or use the search icon to find the transaction,

### Transaction Information

Transaction ID *	Amount *
<input type="text"/>	<input type="text"/>

4. Enter the amount to be refunded,
5. Select the Refund button.

## Chargeback Process

To view a charge back, first log into the [NMI Portal](#). Charge backs happen when the purchaser disputes a charge. When a charge is disputed, SITSD will receive an email and will then contact the administrator for the merchant account. You should continue to use the same process currently in place to deal with charge backs.

Here is how you can view any charge backs:

1. Navigate to **Transaction Reports** on the left-hand menu near the bottom,
2. In the “Search Transactions” section, go to **Action Type** and drop down the list,
3. Select **Returns/Chargebacks**,
4. Select a date for **Start Date** and **End Date** at the bottom of the section,
5. Select **Submit**.

Search Transactions

Show Today's Transactions

Transaction ID	Order ID	
<input type="text"/>	<input type="text"/>	
First Name	Last Name	
<input type="text"/>	<input type="text"/>	
Email Address	Account Number	
<input type="text"/>	<input type="text"/> (Credit/Checking)	
Status	Transaction Type	Action Type
<input type="text"/>	<input type="text"/>	<input type="text"/>
Processor	Mobile Device	Platform ID
<input type="text"/>	<input type="text"/>	<input type="text"/>
Customer ID	Company	Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
PAR	HMAC	
<input type="text"/>	<input type="text"/>	
safrs business unit	License Number	Establishment Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mode of transit	Case Number	
<input type="text"/>	<input type="text"/>	
Min. Amount	Max. Amount	
<input type="text"/>	<input type="text"/>	
Start Date	End Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Submit"/>		

## Transaction Reports

To view reports, first log into the [NMI Portal](#). Not all information will be available in the NMI reports, however, all information is available in the Custom Reports which are discussed in the next section. For more information, you can watch this [nine-minute](#) video.

1. Navigate to **Transaction Reports** on the left-hand menu near the bottom,
2. At the top, enter the appropriate **Group By**, **Start Date**, and **End Date**,
3. Select the **Submit** button or scroll to the “**Search Transactions**” section,

Transaction Snapshot

Group By  
Settlement Batch

Start Date  
02/01/2021 12:00 AM

End Date  
02/05/2021 11:59 PM

Submit

4. In the “**Search Transactions**” section enter the appropriate search criteria,

Search Transactions [Show Today's Transactions](#)

Transaction ID  
Order ID

First Name  
Last Name

Email Address  
Account Number  
(Credit/Checking)

Status  
Any

Transaction Type  
Any

Action Type  
Any

Processor  
Any

Mobile Device  
Platform ID

Customer ID  
Company  
Phone Number

PAR  
HMAC

sabhrs business unit  
License Number  
Establishment Name

Mode of transit  
Case Number

Min. Amount  
Max. Amount

Start Date  
02/01/2021 12:00 AM

End Date  
02/05/2021 11:59 PM

Submit

5. Select the **Submit** button,
6. Once the report is displayed, the data can be downloaded to Excel or CSV,

[New Run Report](#)

02/01/2021 12:00 AM To 02/07/2021 11:59 PM  
Sorted from oldest to newest.

Type	Status	ID	Customer	Details	Time	Amount
Card Sale	Approved	5982057390	Michael Douglas	3...0849	2/3/2021 2:07:10 PM	25.75
Card Sale	Failed	5982066511	Michael Douglas	3...1111	2/3/2021 2:10:28 PM	14.50
Card Sale	Approved	5983976084	Michael Douglas	4...1111	2/4/2021 10:14:52 AM	56.49
Card Sale	Abandoned	5984089872	Michael Douglas	4...1111	2/4/2021 10:50:48 AM	1,534.97
Card Sale	Approved	5984064907	Michael Douglas	4...1111	2/4/2021 10:52:59 AM	1,534.97
Card Sale	Abandoned	5984829688	Michael Douglas	4...1111	2/4/2021 4:17:04 PM	103.47
Card Sale	Approved	5986993404	Michael Douglas	3...4065	2/6/2021 10:13:58 AM	5.29
Card Sale	Approved	5987987305	Michael Douglas	5...5296	2/6/2021 3:41:10 PM	3.15
Card Sale	Approved	5988008721	Michael Douglas	6...1778	2/6/2021 3:50:24 PM	13.80

1 - 9 of 9 (9 Total)

☒ Microsoft Excel (.xls)  
☐ Comma Separated Value (.csv)

Format: Original Format [View Format](#)

Download Transactions


7. Note that the downloaded data will contain more columns than displayed on the screen based on the Format selected.

## Custom Reports

SITSD has developed custom reports that can be found at <https://payzangreports.mt.gov>. Permissions for state agencies are controlled through Active Directory. Permissions for non-state agencies are controlled through Okta.

1. Agency will create an active directory group which will start with the agency 3 letter acronym followed by a space and then **"PAYZANGREPORTS"** followed by a space and another descriptor. For example, access to the SECGC reports would be granted by using the Active Directory group **DOA PAYZANGREPORTS SECGC**.
2. Once the agency has created the Active Directory group and has added users to that group, they enter a case into ServiceNow with the group name and the URL of the payment page for which that group should be granted permission.
3. Agency then maintains adding/removing users from the Active Directory group based on the needs of the agency.

### Sample Report (DRAFT)



Montana Online Payment Portal

Transaction Date

2/4/2021 5:14:52 PM to 2/16/2021 6:47:32 PM

Credit Card Type

All

Transaction Type

cc

Transaction ID

All

Department of Administration Transactions (61010)

File Create Date	Transaction ID	Transaction Date	Status	Transaction Type	First Name	Last Name	Credit Card Type	Net Settlement %	Transaction Amount	Net Settlement %	Interchange Fee	Payment Amount
3/30/2011	5983976084	2/4/2021 5:14:52 PM	pendingsettlement	cc	Shannon	Test UM	Visa	-1.499.11%	\$56.49	-1.499.11%	\$-846.85	\$903.34
3/30/2011	6014223560	2/16/2021 6:38:39 PM	pendingsettlement	cc	test	test	Mastercard	83.58%	\$5,500.00	83.58%	\$4,596.66	\$903.34
	6014243651	2/16/2021 6:47:32 PM	pendingsettlement	cc	SEcond Test	Active Fields	Visa	98.18%	\$5,500.00	98.18%	\$5,400.00	\$100.00
3/30/2011	5983976084	2/4/2021 5:14:52 PM	pendingsettlement	cc	Shannon	Test UM	Visa	60.68%	\$56.49	60.68%	\$34.28	\$22.21

Products for Transaction: 5983976084

Product	Product Description	Quantity	Product Cost
123	Convenience Fee	1	\$1.19
1234	Food Truck	1	\$45.00
56030-652061-02427-41	Magical Product	1	\$1.00

Payments for Transaction: 5983976084

Transaction ID	Payment Reference	Payment BU	Customer ID	DepositID	SystemID	Payment Amount
5983976084					GSLPROD	\$122.21
5983976084					GSLPROD	\$100.00
5983976084					GSLPROD	\$903.34
5983976084					GSLPROD	\$122.21
5983976084					GSLPROD	\$22.21

Distributions for Transaction: 5983976084

Transaction ID	Payment Line Number	GL Business Unit	Account	Fund	Organization	Program	Project	Sub Class	Distribution Amount
5983976084	1		2508	07014		2011			\$-1,125.55
5983976084	1		2508	07014		2011			\$-22.21

Merchant Fields for Transaction: 5983976084

Transaction..	Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8	Field 9	Field 10	Field 11	Field 12	Field 13	Field 14	Field 15	Field 16	Field 17	Field 18
5983976084	61010	05-lic#	Student Id	truck	NIPMID Number													
5983976084	61010	05-lic#	Student Id	truck	NIPMID													